

**APPENDIX A - JOINT CASE MANAGEMENT STATEMENT AND PROPOSED ORDER**

**UNITED STATES DISTRICT COURT  
NORTHERN DISTRICT OF CALIFORNIA**

		<b>CASE NO.</b>
<b>Plaintiff(s),</b>		
<b>v.</b>		<b>JOINT CASE MANAGEMENT STATEMENT AND PROPOSED ORDER</b>
<b>Defendant(s).</b>		

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The parties to the above-entitled action jointly submit this Case Management Statement and Proposed Order and request the Court to adopt it as its Case Management Order in this case.

**DESCRIPTION OF THE CASE**

- 1. A brief description of the events underlying the action:**
- 2. The principal factual issues which the parties dispute:**
- 3. The principal legal issues which the parties dispute:**
- 4. The other factual issues [e.g. service of process, personal jurisdiction, subject matter jurisdiction or venue] which remain unresolved for the reason stated below and how the parties propose to resolve those issues:**
- 5. The parties which have not been served and the reasons:**
- 6. The additional parties which the below-specified parties intend to join and the intended time frame for such joinder:**
- 7. The following parties consent to assignment of this case to a United States Magistrate Judge for [court or jury] trial:**

**ALTERNATIVE DISPUTE RESOLUTION**

- 8. [Please indicate the appropriate response(s).]**
- ☐ The case was automatically assigned to Nonbinding Arbitration at filing and will be ready for the hearing by (date)\_\_\_\_\_.
- ☐ The parties have filed a Stipulation and Proposed Order Selecting an ADR process (specify process):\_\_\_\_\_.
- ☐ The parties filed a Notice of Need for ADR Phone Conference and the phone conference was held on or is scheduled for \_\_\_\_\_.
- ☐ The parties have not filed a Stipulation and Proposed Order Selecting an ADR process and the ADR process that the parties jointly request [or a party separately requests] is \_\_\_\_\_.

**9. Please indicate any other information regarding ADR process or deadline.**

#### **DISCLOSURES**

**10. The parties certify that they have made the following disclosures** *[list disclosures of persons, documents, damage computations and insurance agreements]:*

#### **DISCOVERY**

**11. The parties agree to the following discovery plan** *[Describe the plan e.g., any limitation on the number, duration or subject matter for various kinds of discovery; discovery from experts; deadlines for completing discovery]:*

#### **TRIAL SCHEDULE**

**12. The parties request a trial date as follows:**

**13. The parties expect that the trial will last for the following number of days:**

**Dated:** \_\_\_\_\_

\_\_\_\_\_  
**[Typed name and signature of co counsel.]**

**Dated:** \_\_\_\_\_

\_\_\_\_\_  
**[Typed name and signature of co counsel.]**

#### **CASE MANAGEMENT ORDER**

**The Case Management Statement and Proposed Order is hereby adopted by the Court as the Case Management Order for the case and the parties are ordered to comply with this Order. In addition the Court orders:**

*[The Court may wish to make additional orders, such as:*

- a. Referral of the parties to court or private ADR process;*
- b. Schedule a further Case Management Conference;*
- c. Schedule the time and content of supplemental disclosures;*
- d. Specially set motions;*
- e. Impose limitations on disclosure or discovery;*
- f. Set time for disclosure of identity, background and opinions of experts;*
- g. Set deadlines for completing fact and expert discovery;*
- h. Set time for parties to meet and confer regarding pretrial submissions;*
- i. Set deadline for hearing motions directed to the merits of the case;*
- j. Set deadline for submission of pretrial material;*
- k. Set date and time for pretrial conference;*
- l. Set a date and time for trial.]*

**Dated:** \_\_\_\_\_

\_\_\_\_\_  
**UNITED STATES DISTRICT/MAGISTRATE JUDGE**